



POLICY NOTE NUMBER 14-01

TO: All Network Centers

FROM: Mark A. Petrilli

DATE: October 1, 2014

RE: Neoserra Reporting Guidelines

PURPOSE: To explain the Neoserra Reporting Guidelines for the Illinois SBDC Network of Small Business Development Centers (SBDCs), International Trade Centers (ITCs) and Procurement Technical Assistance Centers (PTACs).

BACKGROUND: As you know, the Illinois SBDC Network continues to look for ways to improve the quality of our advisor and client data contained in the designated client tracking system Neoserra. This Policy Note is intended to serve both as a reference for you and your fiscal and administrative offices. The Illinois SBDC will continue to update the Neoserra User Guide and impact forms.

Each center must continue to maintain accurate and up to date records on all client consultations and training activities in accordance with program guidelines and policies including tracking all consultation hours, maintaining accurate business advisor notes and securing required economic impact verifications. All centers must continue to utilize Neoserra, the client tracking management information system designated by the Department of Commerce and Economic Opportunity. All centers are also required to continue to utilize DCEO's Grantee Reporting System (GRS) for fiscal reporting.

PROCEDURE:

Change in Staff and Jobs Retained Milestones

Manually entering Change in Full Time Staff, Change in Part Time Staff, Change in Export Related Staff and Jobs Retained milestones now **REQUIRE**, at a minimum, that you include a Job Title and Job Type (Permanent Full Time, Temporary Full Time, etc.) for **EACH** job when entering manually into Neoserra. For example, if you have 5 Change in Staff you must enter 5 individual milestones. Change in Staff or Jobs Retained will **NOT** be accepted without this detail. You will find these two fields near the bottom of the New Milestone page. For detailed instructions see the Neoserra Users Guide on Center Connect.

Electronic Impact Survey & Change in Staff Milestones

The next Economic Impact survey will be sent in December. Please continue to collect economic impact data as needed. Remember that each individual Change in Staff (job created or job retained) must include, at a minimum, the JOB TYPE and JOB TITLE when you create the new milestone.

Monthly Milestone Audit

SBDC, ITC & TIES Centers must run a monthly audit of your Capital Funding and Impact milestones before we close Neoserra/WebCATS on the 10th day of the month to ensure the accuracy of your data. This will require you to run two reports, one for the Capital Funding milestones and one for the Milestones for the appropriate month.

PTAC's must run a monthly audit of your Awards and Impact milestones before we close Neoserra/WebCATS on the 10th day of the month to ensure the accuracy of your data. This will require you to run two reports, one for the Capital Funding milestones and one for the Milestones for the appropriate month.

All centers should be running multiple reports including counseling, professional development and training events to monitor progress towards goals.

Adding Advisor Expertise to the Advisor Profile

We will now use Neoserra to track advisor expertise and geographic area. All members of the network will then be able to filter to find advisors by expertise and location. All members **MUST** complete the Areas of Expertise and Geographic Territory in the Advisor Profile.

EFFECTIVE DATE: October 01, 2014

ATTACHMENT(S): Copies of the Neoserra User Guide and Economic Impact Forms are available on [CenterConnect](#) or through your Network Coordinator.

INQUIRIES: For detailed instructions on following the policies explained below please see the Neoserra User Guide on Center Connect. The revised Illinois SBDC, ITC and PTAC Economic Impact forms are also available on Center Connect. Any additional questions may be directed to your Network Coordinators.